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## **Open strategy: Effects of inclusion**

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Work in progress

## Introduction

The purpose of the paper is to investigate some effects of inclusion in strategy processes, while this is a cornerstone in open strategy. Every day, companies are confronted with intensive competition, turbulence and change, which means that companies are facing new types of complex tasks, including innovation pressure, high levels of uncertainty, geographic diffusion, networking, self-managing employees, digitalization, shorter strategic lifecycles and skydiving communication cost (Mønsted and Poulfelt, 2007; Hamel, 2007). The need for improving the strategy work has long been acknowledged, and the key to creating and sustaining success is the ability to generate effective and innovative strategies (Baden-Fuller and Pitt, 1996). In trying to keep up or adapt to the global changes in the environment one approach is more openness to strategy. This means that more organizations become more transparent about their strategies including different types of actors in developing strategy and the open strategy processes involve a variety of strategy practices, for example open space workshop (Owen, 2008), strategy jamming (Bjelland & Wood, 2008), strategy crowdsourcing (Stieger et al., 2012), strategy blogs and wikis (Dobusch & Kapeller, 2013) or strategy simulations in online games (Aten & Thomas, 2016).

Strategy work has become more open over the last half-century (Whittington et al. 2011), both internal and external. Internal, by informing the organization more open about strategic choices and even involving more actors in the strategy making (Friis, 2012). External, by informing more open about strategic choices to the shareholders. Opening up the strategy calls for new and different tools and practices creating new and different spaces for strategizing, challenging the strategy profession. The use of specific socio material practices foster openness in organizations and creates commitment (Guth and MacMillan, 1986; Kim and Mauborgne, 1998), integration of sub-unit goals (Ketokivi and Castañer, 2004) and collective sense making (Gioia and Chittipeddi, 1991).

Opening up strategy *“is not an unalloyed good for organizations. For many, greater openness comes willy-nilly and unwelcome”* (Whittington et al., 2011: 531). *“Traditional business strategy has guided firms to develop defensible positions against the forces of competition and power in the value chain, implying the importance of constructing barriers to competition, rather than promoting openness”* (Chesbrough and Appleyard, 2007: 57). To be able to study the effects of openness of strategy a theoretical framework needs to be developed, which will be done in the next section.

## Framework for open strategy

The field of strategy has historically been a business for top management focusing on planning in the 1950es moving to strategic planning in the 1960es and ahead. The economic research tradition entered heavily in the 1980es lensing in the analytical focus, where most of the traditional strategy research contributes with abstract contributions explaining mostly the “what and why” questions. In the traditional approach, it is taken for granted that strategy is merely for the top management, and first in the 1990es, (Floyd and Wooldridge, 1996) middle managers are taken into considerations. Still most strategy research has been done to argue for a counter point or astonishment to existing strategy research, as for example the strategy content or strategy process, deliberate or emergent strategy, strategy as an external position or internal resource base (Mintzberg and Waters, 1985; Chakravarthy and Doz, 1992; De Wit and Meyer, 2010). This clearly indicates that strategy is a complex phenomenon with many different definitions. Most definitions leave out some important aspect of strategy, as for example the position approach neglects the company’s recourses and vice versa (see for example Porter (1985) for the positioning approach and Barney (1991) for the resource approach. Further, most approaches leave out the humans, and the actual doings (Jarzabkowski and Spee, 2009). Porter defined strategy as “*the creation of a unique and valuable position, involving a different set of activities*” (1996: 68). This indicates that strategy is both content (meaning that it needs to be unique and with a valuable position), and process (meaning that strategy involves a set of (different) activities). This definition can be extended by the Strategy as practice (SAP) approach, where strategy is conceptualised as “*a situated, socially accomplished activity constructed through the interactions of multiple actors*” (Jarzabkowski, 2005: 7). Thus, strategy is usually not understood merely as a fixed property (in a document or PowerPoint presentation) of organisations, i.e. something they *have*. It is also something people *do*. This ‘doing strategy’ or ‘strategizing’ raises questions about how multiple actors strategize and which practices they draw upon to create a unique and valuable position. This opens up for looking at the actual way an organisation is changing its business model to stay competitive. The SAP approach saw the light in the late 1990es and gained momentum in the 2000s. The SAP approach moved the focus to the sociological aspects of strategy bringing back the human actors to the centre-stage of strategy arguing that it is the actors doing strategy. This turns the focus to the micro level analysis of strategy. SAP centralizes the focus around praxis, practice and practitioner (Reckwitz, 2002;

Whittington, 2006). The three individual elements help explain the phenomenon of strategy; there are the actual people (strategy practitioners) doing strategy, second there are the strategy tools and practices used to do strategy and third, the actual “*stream of activity in which strategy is accomplished over time*” (Jarzabkowski and Spee, 2009:73). Still, this needs to be combined with strategy content (the creation of a unique and valuable position), which mean that the strategy activity is about creating a unique and valuable position in the environment and is done combining the use of practitioners and practices. This is addressed by Whittington (2007) arguing that strategy is a profession like for example law or medicine. This means that he adds a fourth P. “*This profession, or institutional field, involves consulting firms, business schools, business media, academic journals, professional societies, enterprises and managers in a joint endeavour that all recognize as somehow strategic*” (Whittington, 2007:1580).

To lensing in on the strategy profession and the strategy work the sociological approach focus on the specific tools or actors and at the “*rich interaction actions within which people and things are engaged in doing strategy work*” (Jarzabkowski and Kaplan, 2015: 537). In developing the theoretical framework, the four individual elements, praxis, practitioners, practice and profession will be developed one by one (Whittington, 2007) where open strategy has to be conceptualized (Whittington et al., 2011; Hautz et al., 2016).

According to Whittington (2007), **strategy praxis** is the activities of strategy, and praxis can be viewed as a stream of such activities over time (Jarzabkowski and Spee, 2009). Praxis overlaps with strategy process, “*tracing processes and activities over time, and linking them to organizational outcomes*” (Whittington, 2007:1578), and practice and practitioner go beyond strategy process, whereas praxis is the local stream of activities, the local institutionalised ‘best practice’ developed over time.

Jarzabkowski and Spee (2009) and Vaara and Whittington (2012) have put a face on **strategy practitioners**, understood as those directly involved in the strategy making, often including CEOs, middle managers, consultants and employees, and indirectly policy-makers, the media and business gurus. Most studies of practitioners have been focusing on the top managers (Jarzabkowski, 2005) or middle managers (Balogun and Johnson, 2004, 2005). Only few studies have been focusing on the employees (Mantere, 2005; Friis, 2012)

More scholars have defined practices (Carter et al., 2008; Chia, 2004; Jarzabkowski and Whittington, 2008; Reckwitz, 2002). **Practices** are routines and norms of strategy work (Carter et al., 2008, Chia, 2004) “*not just obvious ones such as strategy reviews and off-sites, but also those embedded in academic and consulting tools (Porterian analysis, hypothesis testing etc.) and more materiel technologies and artefacts (PowerPoints, flip-charts etc.)*” (Jarzabkowski and Whittington 2008:101). Reckwitz (2002) notes the interrelatedness of practices and their materiality, but moves on to develop the embodied aspect of practices, “*a repository of ‘background coping skills’ upon which actors unconsciously draw as part of their everyday ‘being’ within the world*” (Jarzabkowski and Spee, 2009:82). Thus, strategy practices are what practitioners use to strategise (Jarzabkowski and Whittington, 2008). Strategy practices can take the form of social, physical and operation procedures, such as heuristics, scripts, routines and languages (Omicini and Ossowski, 2004).

Whittington et al. (2011) argue that **open strategy** challenges the traditional strategy thinking in to elements, strategy is for the corporate elite (Andrews, 1971; Montgomery, 2008), and therefore it also is shrouded in mystery and secrets. This indicates that strategy traditionally is exclusive and only for the few “invited to the party”. And it is easier to keep a secret the fewer who have information and this of course will obstruct rivals to imitate the strategy (Makadok and Barney, 2001). Both are challenges by open strategy and are about inclusion and transparency. Following Whittington et al. “***inclusion refers to participation in an organizations’ strategic conversation. Transparency refers to the visibility of information about an organizations’ strategy potentially during the formulation process***” (2011: 536). In the next section, the methodology is developed.

## Methodology

The current paper is based on a three-year longitudinal case study (Eisenhardt, 1989) and examines a strategy process as it unfolds over an eight-month period in a Danish textile company. This study focuses on the data collected in the eight-month strategy development period, which generated a rich set of process data (Langley, 1999). We employed ethnographic methods in our data collection (Agar, 1980; Atkinson and Hammersley, 1994; Van Maanen, 1988), to get close to the concrete activities (Emerson, Fretz and Shaw, 1995). Our approach to the analysis of our empirical data is corresponding with ‘iterative theory-building’ as described by Orton (1997) or the ‘iterative-inductive’ approach by O’Reilly (2005). We have been going forth and back between theoretical

concepts and our data. In the analysis, we focus on the role and tasks of strategy work, with focus on open strategy.

These findings have been used to develop a questionnaire to examine if there can be identified some general patterns of open strategy. The questionnaire has been distributed to Danish organizations. The questionnaire was formulated and pilot tested on 70 respondents in order to improve our survey. We discussed the questionnaire with the 70 respondents; these were primarily middle managers, but some top managers and employees participated in the pilot test as well, and adjustments were made. The questions were developed based on the findings from the case study and the theoretical approach regarding strategy context, content, process and Strategy as practice. Usually, questionnaires are distributed to specific respondents in the organizations, as for example the CEOs or the middle managers. This is common practice in strategy research. One of our key ideas was to include all levels in the organizations: top managers, middle managers and employees. This of course challenges the traditional approach to strategy, which focuses on strategy content and top managers. We also extend the approach by including the process focus to the strategic areas. In real life, all sorts of contingencies can keep people from participating in the strategy work. We consider the strategist to hold a social position, by which we mean the nexus of an individual agent and social structure, where the agents have some knowledgeability as they interact with social structures, allowing them a degree of self-determination (Giddens, 1984). This thus provides scope for asking the employees about the strategy work in the organization. The questionnaire was distributed electronically to respondents, and they were encouraged to distribute the questionnaire to other respondents in their organization. The respondents were found through different sources: a database with approx. 50,000 email addresses on top managers from private and public companies in Denmark, our network, among managers attending business classes at the university and from different industry associations. We received more than 5,000 responses from more than 1,700 organizations. Close to 3,500 questionnaires were fully answered. We got answers from approx. 1900 top managers, 750 middle managers and 750 employees.

## **The case**

The case company is a mid-sized Danish textile company. It produces labels, hangtags and packaging, the clothing industry being its primary customer.

There are many strategy activities in the timeline of the strategy process with entanglement of practices and strategy practitioners, but there is some kind of natural flow. The activities take place in the period February–October 2009. The involved practitioners include top management, external consultants, middle management and employees.

First, at a strategy workshop, the management group defined the company's strategic challenges: having a clear strategy, keeping focus on the strategy, conveying the strategy, evaluating and adjusting according to the strategy; the criteria for success were that the employees understand and assume the responsibility for the strategy. The outcome of the strategy workshop was a rough-grained corporate strategy expressed by a mission, a vision and a strategy, which are depicted in table 1.

Table 1. Mission, vision and strategy developed by the management group

Mission	By development, worldwide sourcing and distribution of trim products – we take responsibility for the whole value chain – from idea to the final product, delivered to the customer.
Vision	Create value for our customers by improved branding of their collections.
Strategy	X will be the largest trim supplier for leading textile brands in Europe before 2015.

Source: Presentation from strategy workshop.

The next strategy activity is a workshop revolved around new practices with the purpose to develop objective in relation to the rough grained corporate strategy. Both middle managers and employees are involved in the activity. The outcome was nine strategy themes. The third activity was establishing and working in nine strategy project groups according to the strategy themes. Again new practices were used. The strategy groups were working from May to June and many activities took place, both formal doings in the planned process and unplanned doings as they emerged. The overall corporate strategy was presented to all of the employees at a joint information meeting in the beginning of November and at the local country offices later that month.

Implementation started in January. The strategies were prioritised according to resources (tangible/intangible, financial, time, etc.) needed. Only one project was postponed to achieve better alignment with other projects, primarily IT projects. The seven other projects started in the period after the last presentation, and in the organisation, an understanding of the strategy shift that the company is undergoing is building, manifesting itself in the statements of three new Swedish employees visiting Denmark. They were impressed by the fact that all employees seemed to have a



common understand of the strategic challenges, entailing that they were not given different answers depending on who they asked (interview, CEO). All projects have more or less been implemented, with a few exceptions. From the strategy process started in 2009 the company grew notable in numbers of employees, turnover, and the profit tripled from 2009 to 2011. In table 2 the company's number of employees, turnover and profit can be seen from 2008 and 2011.

	2008	2009	2010	2011
Number of employees	250	270	350	420
Turnover (mio dkk)	237	252	331	436
Profit (mio dkk.)	8,01	8,02	?	23,9

## Case findings

The practices used in the strategy process changed in the three activities, with heavily employee participation opening up the strategy process in the second and third activity. In particular in the third strategy activity the practices caused dispersed outcome. This outcome can be related to the practices in use, and the actual doings. Mostly the outcome of the strategy activities went on as planned, but more unplanned event occurred as for example a strategy group taken an unexpected turn, replacement of more project managers, planning along the way in the process etc.

The strategy activities are staged entangled by praxis, practitioner, practices and tools. The formal ones are the two workshops and the strategy group work, the strategy workshop with management; the management group worked out a mission and a vision and developed the rough-cut version of the company's corporate strategy via the entangled use of socio-material practices and tools. The Porterian-based tool was a survey with questions regarding the three generic strategies, which produced the strategy 'solution'.

The second activity, the open space workshop, was staged in such a manner, to raise questions and issues, thus opening up for employee participation. The open space workshop was restricted and controlled, because it took place after management had formulated the main elements in the strategy and before the strategy projects were launched. This activity paved the way for improvements in the entire organisation by asking questions about well-known issues. The workshop created motivation, energy, cross-sectional discussions and a feeling of ownership. This was the first critical point in the process given that as the employees were invited into the workshop as active performers. This

activity is entangled with practices creating a strategic conversation with actors from different organizational levels contributing to the strategy making.

The third activity covers the nine strategy groups. In the strategy group work, all groups had a tendency to look for solutions and actions to be taken; maintaining a focus on producing ideas and objectives proved complicated and challenging. This has several reasons: *“We are action-oriented, we are used to and good at following a good idea, and we are used to solve problems along the way”* (interview, HR manager).

Most employees have expressed their appreciation to be a part of the strategy process, creating ownership to the process, here exemplified by Pamela: *“Sometimes you are more aligned/tuned in when it comes from the whole organisation that we have to change than if it had come from the top...there is a greater chance for success because we are involved, and I am more committed, and I would like to be part of making the [sales] presentation...and because you are part of it, you have a sense of it, more than if it was decided from the top down...this kind of involvement has a positive impact on the understanding, it creates a better understand of what we have to do”* (interview, employee). More employees have indicated that they found it difficult to contribute, because of the abstract nature of the task (compared to the more tangible daily tasks). It was the first time the employees were involved in projects where they were asked to create objectives and not just solutions. Between the strategy meetings, the participants in the strategy groups worked with the agreed-upon tasks. This went on as traditionally project work with the twist that the groups were doing strategy.

In the final stage, all strategy groups worked to become ready for the final presentation. Several of the strategy groups were reduced, as group members felt that they had nothing left to contribute. The work became more operational in the sense that action plans and resource budgets were made and that future project managers and group participants were appointed.

The work in the strategy groups needed differentiated involvement from the remaining organisation, but all groups were working on a background of remarkable quietness in the organisation. After the final presentation, all strategy groups received a green light; some, however, still had to improve on different aspects and some projects were shelved because of a lack of resources. Managers and middle managers were connected to all strategy projects from this point. Furthermore, as a surprise (to management), the employees displayed high levels of engagement, working hard to make

strategy objectives, and against that background, management decided that all strategy groups were to get the green light; of course, moderations of the strategy objectives and action plans could occur. During the strategy process, the corporate strategy has been communicated more than five times at joint information meetings and one time with the employee in the project groups. Moreover, the high involvement created high motivation, and because the employees had been part of making the action plans.

The case findings showed high involvement in a strategy process with high economic performance in the 3 years period from 2008 to 2011. The corporate strategy was presented at least 6 time to all employees of the company by the CEO and the corporate strategy was translated into action plans by the project group including most of the employee. The process was characterizes by highly motivated employees doing fast execution of the sub-strategies (because they made the goals and action plans for execution).

## **Survey findings**

Can this pattern of consequences of involving employees in the strategy work be seen more generally in organizations? We developed five questions from the case related to the open strategy approach. We wanted to see if involvement in the strategy work is 1) related to the degree in which the strategy is known in the company, 2) translated into actions plans at all levels in the company, 3) related to increase in motivation, and 4) finally related to the financial performance. As presented above open strategy is about involving the organizations strategy work, that means that all employees in a organizations can be part of the strategy work and the more the organization is involved in the strategy work the more open the organization is, as discovered in the case above. Here we have termed the organization in three levels: top managers, middle managers and employees. This gives us the opportunity to see if there is some general pattern related to organization opening up strategy (work). The results of our survey are presented in table1. In the top row the organizational level shows how many percentages of the top managers, middle managers and employees agree or disagree that the employees are involved in developing the strategy in the organization. This is combined with the effects of open strategy, showing how many percentages of the top managers agree or disagree to if the strategy is known, translated into action plans, etc.

**Table 1. The employees are involved in developing the strategy for the company**

Organization level		Top managers		Middle managers		Employees	
Effects of open strategy	%	Agree	Disagree	Agree	Disagree	Agree	Disagree
The strategy is known at all levels in the company	Agree	76,0	40,0	72,6	23,6	71,1	22,1
	Disagree	4,4	28,1	4,8	43,7	9,6	52,2
The strategy is translated into action plans at all levels in the company	Agree	62,3	35,4	68,6	26,5	60,6	20,6
	Disagree	9,7	35,2	9,3	44,3	14,7	54,3
Motivation has increased over the last 2 years	Agree	57,7	44,8	54,0	25,9	35,3	11,6
	Disagree	6,1	12,8	10,5	35,3	13,8	50,5
The company's financial performance has improved over the last 2 years	Agree	62,5	64,2	58,9	51,8	49,5	31,3
	Disagree	14,4	16,7	10,1	18,5	8,7	19,1

It seems like involving middle managers and employees in the strategy work makes the strategy well-known in the company. More than 70% agreed on that. If the employees are not involved 40,0% of the top managers still find that the strategy was known at all levels in the company while only just over 20% of middle managers and employees were of the same opinion. For those employees who were not involved in the strategy work more than 50% felt that the strategy was not known at all levels in the company. Involvement has clearly an effect on the participant's perception of how well known the strategy is in the company.

Whether involvement in the strategy work leads to translating the strategy into action plans follow the same pattern as the first question about how well known the strategy is. A vast majority (more than 60%) of both top managers, middle managers and employees agreed that the involvement also lead to more operation plans for implementing the strategy. 14,7% of the employees did not find that participating in the strategy work also make the strategy expressed in action plans. If there were no involvement in the strategy work, more than 50% of the employees did not find the strategy embodied in action plans.

Involvement in the strategy work can lead to an increase in motivation. More than 50% of top managers and middle managers agreed on both involvement of the employees in the strategy work and on an increase in motivation in the last 2 years, while 35,3% of the employees had the same view. If there was no involvement, more than 50% of the employees find that the motivation was not increased in the last 2 years. Many factors influence motivation, so this is only an indication that involvement in the strategy work also is one of these factors.

We cannot say that involvement of employees in the strategy work has a significant impact on the financial result. The survey was made in times of economic growth in the society. We therefore expect the majority of the companies to face increase in the financial performance. Whether the employees were involved in the strategy work or not more than 60% of top managers said that the company's financial performance has increased in the last 2 years. Both middle managers and the employees agreed on that on a little lower level but still with the same trend.

## **Discussion and concluding remarks**

In the case study, the involvement of internal practitioners shows that commitment, integration of sub-unit goals and collective sensemaking creates fast implementation. Involving the employees in part of the strategy making, by **letting them make strategy objectives and action plans**, has proven to be an effective way to open up the strategy process and let more actors, here the employees be part of the strategy making. In this way, employees become **strategy makers**, **strategy translators** and finally **strategy implementers**. Distributing strategy work to communities of practice, in this case groups of employees (Jarzabkowski, 2004), creates a feeling of psychological ownership of the strategy, *“because distributed control means more control to individuals over strategy [and] freedom to make sense of strategy also leads to more intimate knowledge of strategic issues for an individual, as the strategy content is personalized through individual sensemaking”* (Mantere, 2005: 175). Even if the strategy groups are not communities of practice, ownership were observed and identified in the strategy activities. The feeling of ownership is observed in the project work and expressed by more employees and project managers; here exemplified by Pamela: *“Sometimes you are more aligned/tuned in when it comes from the whole organisation that we have to change than if it had come from the top...there is a greater chance for success because we are involved, and I am more committed, and I would like to be part of making*

*the [sales] presentation...and because you are part of it, you have a sense of it, more than if it was decided from the top down...this kind of involvement has a positive impact on the understanding, it creates a better understand of what we have to do”* (interview, employee). Involvement created ownership and commitment to the strategy, so the employees could make sense and see their role in the strategy.

The survey shows coherence between involvements of the employees in the strategy work and how well known the strategy is in the organization. It also shows that the strategy was translated to action plan if the employees were involved in the strategy work and indicated that involvement increase motivation of the employees. Apparently, the financial performance has improved for companies involving employees in the strategy work but the same goes for companies that don't. Therefore, from the survey we cannot conclude that involvement leads to better performance.

We claim that involvement of both the middle manager and especially the employees in the strategic conversation by letting them generate strategic objectives and the make strategic choices and subsequently make action plans is inclusion. The effect of inclusion in the case study is obvious. The same pattern was found in the survey. If middle managers and employees are involved in developing the strategy, it becomes well known in the company, and action plans are made. On the other hand, if there is no involvement 50% of the employees did not find the strategy embodied in action plans. Following the case finding inclusion also led to fast implementation. Further, it motivates to be involved in developing the strategy, but that is only one element of motivation. There are many other elements related to motivation, but we claim that being part of the organizations strategic conversation increase the motivation, as shown in the case study and indicated in the survey.

In the case study the profit triples over a three years period, still it cannot be linked directly to the strategy process, but in the survey there are not remarkable differences in the organization have been involved in the strategy work. They have all performed better. But all in all it looks like there are many positive effects letting the organization be part of the strategy work.

## **Further research**

In progress...

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